

Employee Financial Education

Description

When you deliver an enduring employee financial experience, you help employees achieve their personal goals throughout every stage of their careers. What's more, a sustainable program supported at the highest levels of your organization demonstrates a corporate commitment to employees and helps positively define your corporate culture. As employees gain financial confidence, and become better prepared for expected and unexpected expenses, they feel a greater sense of allegiance to your company, too.

[Get Started](#)

Select image alignment:

☐ Left ☒ Center ☐ Right Select image max-width:47.5% Select left part width:35%

Select background width:24%

Why Employee Financial Education™?

Your goal is to provide employees with great benefits. But an important thing you may not be providing is how those benefits fit into an employee's overall financial picture.

Presently, nearly half of American employees are worried about their personal finances. It's understandable. In school, we were never taught fundamental financial principals like saving, investing, and diversifying assets. And now we're seeing the long-term effect: employees are looking for financial guidance that employers may not have the time or resources to provide.

What is the need for a financial well-being program?

of employees reported they are stressed about their finances. This is an 11% increase since 2021.

(Source = BrightPlan's 2023 Wellness Barometer Survey)

of employees say employers should play a role in supporting their financial wellness.

(Source = BrightPlan's 2023 Wellness Barometer Survey)

So how does financial education benefit your company?

By delivering an enduring employee financial experience, you're helping employees to achieve their personal goals throughout every stage of their career. What's more, a sustainable program supported at the highest levels demonstrates a corporate commitment to employees and helps define corporate culture. Employees gain financial confidence, feel a greater sense of engagement and retention, and preparation for both expected and unexpected expenses. It's a win-win.

That's why we created PlanWell™.

Select image size:1% Select image X position:1% Select image Y position:1%

91% of employees are worried about their personal finances

costing employers about one month of productivity per year.* They're looking for guidance that you may not have the time or resources to provide.

(Source = SpiceWorks, Businesses Losing \$500 Billion Due to Employees' Financial Stress, January 7, 2025)

default watermark

Select image size:30% Select image X position:78% Select image Y position:50%

Talk to our team about bringing a personalized Employee Financial Experience™

to your HR offering.

[Let's Talk](#)

Date Created

April 13, 2022

Author

planwellstg

default watermark